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Rethink, Reuse, Recycle: Turning an Existing Workshop into a Virtual Opportunity for Outreach and Engagement

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Abstract: This case study of using a webinar series as a library marketing technique shares the process, communications, and assessment results from a well-attended online event, “Summer of Citations.” An in-person citation management software workshop for graduate students by librarians at a small midwestern private university served as a springboard for the series. Targeted to faculty, graduate students, and undergraduate honors students, the Zoom-based, 45-minute sessions covered a different product on each of three successive days. A common structure for each presentation, along with the use of Springshare modules for registration and assessment, facilitated the event’s rapid production and easy replication.

Keywords: Outreach, web-based instruction, academic libraries, online workshop, case study, COVID-19, Zoom



Introduction

After the intense push for online instruction to finish out the 2020 spring semester, University of Dayton (UD) Libraries' librarians began to think of other ways to engage and assist their newly-remote community. With the building closed and all services moved online, the libraries nevertheless needed to be able to stay in touch with users, and they therefore turned to programming ideas with broad appeal that could be put together easily and quickly.

Over the previous decade or so, UD offered both hybrid classes and a few completely online graduate programs but, as a primarily residential campus, in-person instruction remained its primary teaching mode. This was also true in the library instruction program, where nearly all sessions took place either in the library classroom or in the instructor's classroom. There were a few exceptions where, in the past couple of years, a few librarians met with classes in the online programs, but these occasions were very few in comparison with the bulk of the library instruction program. While UD's institutional-level Office of eLearning offered workshops and support for faculty teaching online courses, the primarily in-person nature of library instruction at UD meant that library faculty had relatively little experience with teaching online. However, the two teams did work together in other capacities and an eLearning staff member introduced Zoom to the instruction librarians at the February 2020 team meeting—a well-timed demo, though no one realized it at the time.

As librarians considered ways to connect with users, one topic they pursued was citation management software. A high-level overview for graduate students shortly before the libraries closed and the university transitioned to all-online instruction served as a springboard for a series of

webinars on three popular, free products: Zotero, Mendeley, and EndNote online. Dubbed “Summer of Citations,” the Zoom-based, 45-minute sessions covered one product each day for three successive days. Librarians agreed on the elements of each product to highlight and used a common structure and template for each presentation. LibCal and LibWizard, two modules of the libraries’ Springshare subscription, were used for registration and assessment.

Summer of Citations was a success in several ways. It attracted 168 registrants from a wide cross-section of the university, about 51% of whom actually attended. In terms of both numbers and departmental representation, the response far exceeded the typical response to in-person programs offered in the past. In addition, the sessions highlighted to the campus community that the libraries provide information and tools valuable and relevant to their work. Presenters benefited from the opportunity to hone their synchronous teaching skills on Zoom, including the use of polling. Librarians also learned pros and cons of different Zoom configurations (e.g., co-host vs. alternative host; meeting vs. webinar). Thorough documentation of all aspects of the planning and implementing the webinar series would also serve as a template and springboard for other similar events.

Literature Review

The need for academic libraries to adapt to the demands of distance education needs is not unique to the COVID-19 pandemic. In the 1990s, the proliferation of the Internet and World Wide Web forced the traditional academic library to consider how their services might change to fit this new paradigm (Wolpert, 1998). This adaptation happened over the course of years, and with varied adherence—often “the biggest obstacles to strategic innovation in established organizations are in the organization itself” (Markides, 1998, as cited in Wolpert, 1998, p. 29). In the case of COVID-19, there was no avoiding the rapid transition to a completely online environment, with the pandemic acting as “a reset moment...the ‘black swan,’ that unforeseen event that changes everything” (Blumenstyk, 2020).

In March 2020, as colleges and universities around the world closed or limited access to their campuses, an urgency for rapid change and collaboration emerged (Baker, 2020; Kim, 2020). Models of synchronous and asynchronous instruction (Mulla et al., 2020) and of supporting faculty career

development (Baker, 2020; Rosen & Lester, 2020) were quickly adjusted to the new and uncertain landscape. With new limitations in place, work shifted to rethinking and recreating formerly in-person meetings as online events (Rogers, 2020; Sickler, 2020).

Much has been written about the desire for training on citation management software (Milewski & Williamson, 2017; McColl, 2018; Speare, 2018; Cuschieri et al., 2019) as well as for opportunities to use webinar formats to deliver traditionally in-person workshops (Peacemaker & Roseberry, 2017; Peuler & McCallister, 2019). As Speare (2018) suggests, a variety of training options that showcase available resources are desired by a variety of students, whether they already use reference management software non-users of reference management software. Mulla et al. assert that “with crisis comes opportunity” (2020, p. 447) and, in fact, the pandemic has opened doors for online modes of instruction and, in turn, greater connectivity with a wider audience.

Marketing remote programs has been a challenge for as long as they have existed (Wolpert, 1998). Fortunately, numerous researchers have developed guidelines and best practices about how to communicate programs to distance learners (Bonella et al., 2017; Meyers-Martin & Lampert, 2013) and how to assess communication efforts to determine effective library marketing strategies (Logan, 2019; Marshall & Reid, 2008).

Rationale for Activity

Beyond occasionally mentioning specific citation products in library instruction classes at the request of professors, librarians had not presented classes on citation management software for several years. In March 2020, they hosted the aforementioned graduate student workshop, but it focused on the benefits of using citation management software generally rather than providing a detailed overview of specific products.

The librarians scheduled a series of webinars about citation management software early in the summer semester, when faculty members, graduate students, and undergraduate honors students might be embarking on summer research. They decided to use an existing citation management software LibGuide, which already included detailed information about setting up and using Mendeley, Zotero, and EndNote online; and would only need minimal

updates. They also decided that LibGuide would serve as an excellent place to post recordings of each webinar (University of Dayton Libraries, 2020a).

Building on the structure of the graduate student workshop, librarians were able to quickly develop a series of webinars to offer as the summer semester began. The webinar format, with its ability to share screens, allowed for a more in-depth exploration of individual products. The librarians also saw these webinars as an opportunity to enhance the libraries' citation management software research guide with recorded videos of the live webinars, the kind of content that Speare's (2018) study indicated was preferred by graduate students over in-person workshops. Half of a semester using Zoom had built librarians' confidence in their abilities to present synchronously online, and keeping the presentations relatively short with dedicated time for questions guarded against Zoom fatigue for participants and presenters alike.

This library's relatively late entry into using webinars for non-classroom programming proved fortuitous in that, by this time, the university had licensed Zoom as its standard conferencing platform. Zoom is remarkably easy to learn and use and, by the start of the summer, the entire university community was familiar with it. The use of synchronous streaming video for events with large numbers of attendees in many locations used to be uncommon and novel, as described in 2013 by Swarm, Vincent, & Gordon (p. 227), and available software had a far steeper learning curve. However, by 2020, technological barriers had vanished; librarians could easily and quickly plan and deliver the programs in a way they would not have been able to years earlier.

The librarians who planned the Summer of Citations workshop series implemented a robust marketing strategy to reach a wide audience who might be interested in the webinars. The librarians also envisioned the webinars as outreach in their own right. Like Miller and his colleagues at University of Maryland University College (now University of Maryland Global Campus), they found library-led faculty workshops to be an effective means of outreach and building partnerships with other university units—such as, in this case, through individual graduate students and faculty members (Miller et al., 2010).

Planning the Activity

When planning this engagement opportunity, the librarians had to react quickly to the call for outreach from library faculty. By reusing existing materials, they were able to offer a series of webinars on citation management within a few weeks. For instance, to prepare the content for the webinars, the librarians modified a Google Slides presentation from a previous citation management workshop and developed a list of features that could be demonstrated with Mendeley, Zotero, and EndNote online. Each librarian chose one product to showcase and prepared for their demonstration by familiarizing or re-familiarizing themselves with the software and its features.

When choosing a Zoom event format, the librarians opted for “meeting,” which allowed more interaction between the presenters and participants than “webinar,” which was designed for much larger audiences.

Although the librarians each taught a few library instruction sessions using Zoom during the end of the spring 2020 semester, they viewed these webinars as an opportunity to test some features and functionalities, such as Zoom polling and a moderated question and answer session, that had been difficult to incorporate previously, given the rapid shift to online learning. They also sought to practice screen sharing and virtual presentation skills.

Implementation

With only a week to promote the Summer of Citations webinar series, the library’s marketing and outreach team spread the news widely. They shared a blog post that included brief descriptions of the programs and a link to the LibCal registration page via the library’s social media accounts, the university e-newsletter, and the internal employee website (University of Dayton Libraries, 2020b). Library colleagues also mentioned the webinars at a meeting of the university’s deans and chairs and sent emails to the graduate school and honors program email lists. Additionally, liaison librarians communicated information about the programs to their departments.

Overall, these marketing efforts attracted over fifty registrants for each webinar. When registering for one or more webinar in LibCal, registrants provided their name, email address, department/major, and classification (faculty/staff, graduate student, or undergraduate student). Upon registration, they automatically received an email with the Zoom meeting link(s) and instructions for joining, and LibCal also sent reminder emails in advance of

each session. One librarian was designated as the host for all three sessions, which allowed her to access the lists of registrants, edit the LibCal events, add more seats when needed, and set up polls in advance. The host librarian also designated alternative hosts who could share their screens and conduct polls during the webinars.

Each webinar began with a Zoom poll that asked participants to share how they currently manage their citations. Then, the librarian launched into a brief Google Slide presentation that introduced the benefits and common functionalities of citation management software. They then presented a live, shared screen demonstration of software functionalities such as importing PDFs and citation metadata; organizing citations; creating bibliographies; using shared libraries or folders with each software package; and using preselected PDFs, database records, and online source. Participants asked questions during the last fifteen minutes of each webinar. Most questions were asked in the Zoom chat box, but some attendees asked questions over audio as well. The librarians answered questions about which software they prefer and how the products are different from each other. They also revisited functions from the live demonstration and showed other functions that participants asked about. All three librarians attended each session; while one librarian was presenting the session, another librarian monitored the chat box and moderated the question and answer session, and another took attendance from the participant list and documented the results of the Zoom poll.

Each webinar session was recorded and saved to the host librarian's Zoom cloud, and Zoom created automatic audio transcription for the recorded videos. After editing spelling and grammar errors in the automatic transcriptions, the videos and caption files were downloaded to a computer and uploaded to Warpwire, the university's video storage and streaming platform. Uploading to this platform allowed the librarians to embed the videos in the existing citation management LibGuide. After the videos were embedded, a link was sent through LibCal to everyone who had registered for any of the webinar sessions.

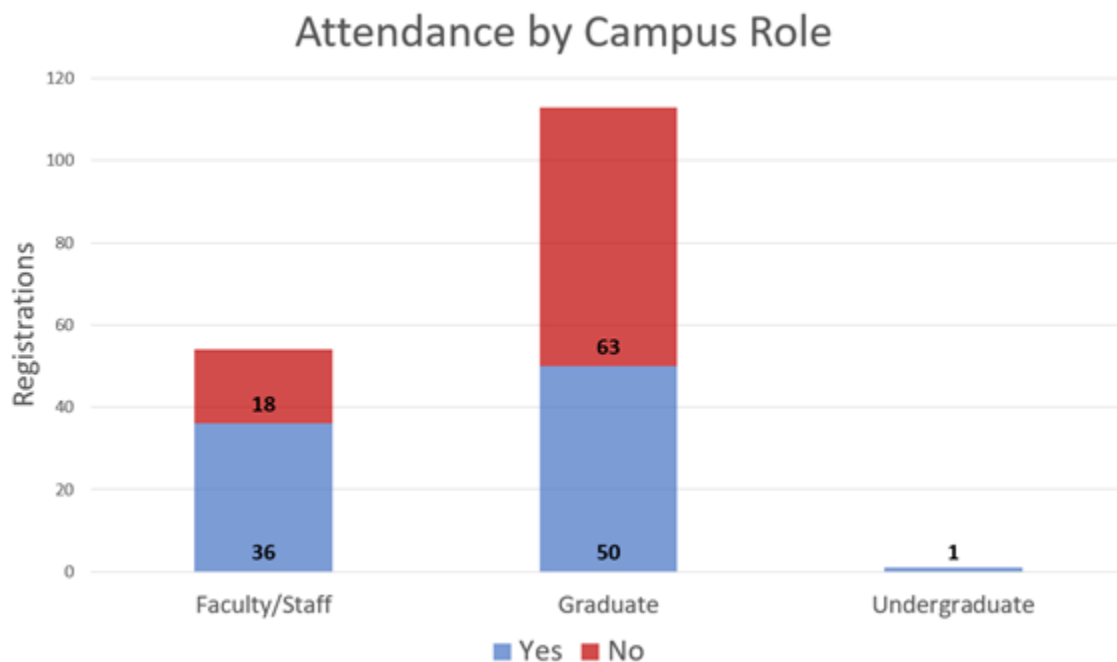
Evaluation of Activity

After the webinars, an evaluation survey was sent to registrants to gather feedback and ideas for future sessions. The librarians gathered a variety

of qualitative and quantitative data to assess the outcomes of the event and marketing campaign. They not only used already-collected LibCal information but also used Springshare's LibWizard to create and send a post-event survey. This survey asked registrants to identify which session(s) they attended and describe their experience with the training. Additionally, respondents were asked to self-rank their knowledge of citation management software both before and after the webinar(s).

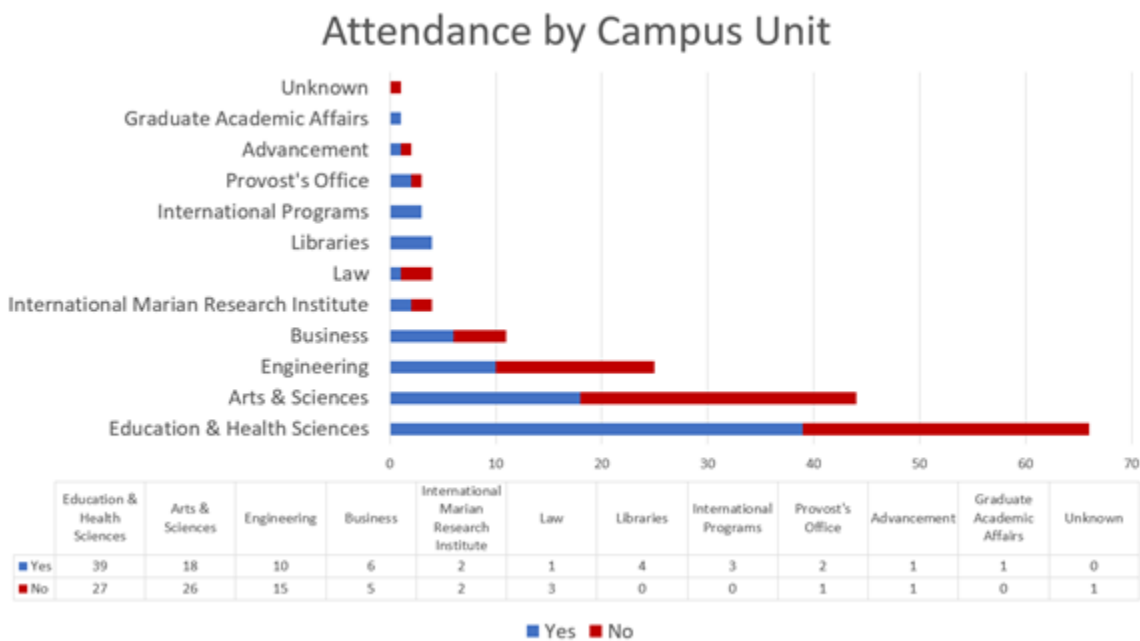
Graduate students comprised the majority of registrants and attendees, though fewer than 50% of graduate students who registered actually attended, compared with 66% of faculty/staff.

Figure 1. *Breakdown of Registrations and Attendance by Campus Role*



The breakdown of registrations and attendance by campus unit was roughly proportional to graduate student enrollment levels, with the School of Education and Health Sciences accounting for the largest percentage of attendees and registrants, just as it accounts for the largest percentage of graduate students at UD (University of Dayton, 2019). Marketing messaging was similar across all schools on campus, so the data may suggest predictable response rates for any repeat instruction sessions on citation management software.

Figure 2. Breakdown of Registrations and Attendance by Campus Unit



The post-event LibWizard survey was distributed to the 87 confirmed attendees and garnered 24 responses. Survey respondents were asked to rate their familiarity with citation management software before and after the event. Their options were, “Extremely Knowledgeable,” “Somewhat Knowledgeable,” “Not Very Knowledgeable,” and “Not Knowledgeable at All.” A 0 to 3 numerical ranking was assigned to each, with 0 representing “Not Knowledgeable at All” and 3 representing “Extremely Knowledgeable.” This data was used to quantify self-reported change in understanding as a means to measure the event’s instruction success. On average, respondents rated their understanding at 1.2 before the event (a little over “Not Very Knowledgeable”) and 2.0 after (“Somewhat Knowledgeable”). This represents nearly a full step of improvement, with 13 respondents reporting one or more steps of improvement, 9 remaining the same, and only 1 moving in a negative direction.

The qualitative feedback section consisted of four questions. The first asked, “What was the most important thing you learned at the webinar(s)?” This question was used to measure the success of the instructors and to gauge which topics stood out among the respondents. Responses to this question fit into four categories:

- *Specific functionality* (n=9) feedback about a feature in the software that stood out to the respondent. A notable subset of respondents identified integration with Microsoft Word or Google Docs as being the most important thing learned.
- *Generic efficiency* (n=7) feedback about how citation management software could, as one respondent wrote, “simplify tasks that are overwhelming.”
- *Awareness of software* (n=5) feedback about knowledge of the existence of multiple types of citation management software and the differences between them.
- *Librarians exist* (n=1) feedback from a user who had not previously been aware of the resources offered by the library.

All four of these categories broadly represent a success from a marketing perspective and room for future improvement in marketing materials. By and large, the data suggests that participants were drawn to the event by the promise of software that would simplify their research and writing processes regardless of whether they were already familiar with the software when they learned about the event or whether they were somewhat familiar and wanted to learn about specific functionalities. Further, through participation, participants became aware of additional resources and opportunities available through the library. The frequent mention of word processor plugin integration in the survey responses means the feature may be a strong selling point in future marketing efforts.

Another qualitative question asked participants for suggestions on how the presenters could improve future sessions. The results were a mix of constructive criticism and positive feedback. The criticism can be divided into two subtly distinct categories: areas for the presenters to improve and areas to improve the presentation. The most frequent point of negative criticism had to

do with the presenters' expertise in the subject matter, followed by difficulties associated with using the online webinar medium, including lack of one-on-one support, connectivity issues, and trouble following the presenter's shared screen. Suggested positive improvements included providing handouts and other materials ahead of time, flipping the classroom by offering small recordings ahead of an interactive Zoom session, and presenting to smaller groups to allow for more engagement.

The final two questions provided an opportunity for respondents to suggest future library instruction sessions or provide feedback that was not collected elsewhere. The open-ended question, "Anything else you'd like to share with us?", generated mostly thanks to the presenters and, in two cases, feedback better suited to the other final question, "What topic(s) would you like to see the UD Librarians cover next?" Though there were fewer clear lines of distinction between major concepts in the results to this latter question, three themes emerged: research support, teaching tools, and publishing. Many of the responses included more than one suggestion or fit more than one category. Graduate students and faculty were understandably interested in pursuing and advancing their own research agendas, with one respondent requesting, "short Zoom sessions that cover the entire research process." Other responses ranged from "tips for searching (i.e. boolean [sic] search terms and technicalities)" to "researching recent, timely topics by discipline." Other responses related to a publishing theme, which contained requests for more technical skills like "prepar[ing] a table of contents and bibliography" and "guidelines on publish[ing] papers in reputed journals." Finally, some attendees requested additional library assistance for their students, especially considering their sudden need for remote learning support. One respondent wrote, "I wish there was a way for my students to 'see' what the library and its specialists are able to provide students," and another sought instruction on copyright and "how to properly use articles [and] online materials as content resources for a class." In many cases, these suggestions were for topics that had been previously taught by university librarians or are continuously available through one-on-one consultations. However, these responses suggest opportunities for future sessions and for increased marketing efforts to ensure awareness of desired library resources and services.

Best Practices and Advice

The beginning of the summer can be a golden time for programming. One of the fortuitous factors in the success of this program was its timing. Since most faculty go off-contract after the spring semester at UD, at the beginning of the summer semester, faculty and many graduate students were planning their research activities for the next couple of months and were perhaps more receptive to learning about citation management software and organizing their research results than at other times of the academic year. “Summer of Citations” tapped into that mindset. In future years, the beginning of summer semester might be flagged as an especially good time to offer nuts-and-bolts programming that will help researchers with organization and productivity.

Record sessions so they can be made available to all who registered, whether or not they could actually attend. Add captions to recorded sessions for accessibility. Offering these sessions as webinars on the Zoom platform was another serendipitous success factor. Under normal and not pandemic-driven circumstances, the dominant mode of instruction and events at this library would be in-person, on-campus, and in-library. Pivoting to Zoom provided far more flexibility in terms of reaching the target audience. Because Zoom sessions could be easily recorded and posted for later viewing, individuals were more apt to register for one or more of the programs, even if they might not actually be able to attend at the designated session time. Recording Zoom sessions to the cloud allows for automatic transcription from Zoom, which can be edited in the host’s Zoom account and downloaded as a .txt file. The librarians uploaded these .txt files to the university’s video storage and streaming platform as closed captions, and the files can also be viewed on the Zoom website.

Decide whether to have one person act as host for all events in the series, or divide the responsibility. One librarian volunteered to be the host and set up the Zoom sessions and registration in LibCal for all three webinars, which made it simple to create and make changes to the events. The host could increase the number of seats in each session, adjust the timing of reminder emails, and extend the registration window without having to coordinate among multiple people to make updates separately. The primary host could designate the other presenters as alternative hosts for each Zoom meeting, so they too could begin the meeting, begin and end recording and polling, and share their screens and poll results.

However, there are drawbacks to using a single host for all sessions. Alternative hosts could view recordings but could not edit the captions or view lists of registrants in LibCal, so the host had to email daily registration updates to the others. In addition, alternative hosts could not see their respective sessions under Upcoming Meetings in their Zoom accounts, and could not set up poll questions ahead of time. Having to make all the updates for each Zoom session and LibCal event meant extra work for the primary host, and the alternative hosts had no control over the set up of their own webinars. Next time, the librarians will likely designate each presenter as primary host of their own session, with others as alternative hosts. Zoom provides a summary of roles in a meeting and what each is authorized to do in its Help Center (Zoom, 2020).

Have a co-presenter handle the chat queue. To allow the presenter to focus on delivering the presentation, it is helpful to designate another person to monitor questions submitted via chat. In addition to reading questions for the presenter's responses, they can post URLs for attendees to access during the presentation and respond privately to individual questions (such as access issues). An active, engaged co-presenter will make the webinar flow much more smoothly.

Use a different polling platform for more robust questions and data. Zoom's polling was convenient to use for this webinar series, but there were a few drawbacks. The librarians were not able to save the results of the poll they used as an icebreaker, requiring them to take a screenshot of the poll results during the session. A different polling platform, such as LibWizard, Qualtrics, or Google Forms, would have allowed for better data to be collected from those who attended the webinars. The librarians could have also captured attendance through a survey rather than manually taking attendance through the Zoom participants window.

Using LibCal for registration serves multiple purposes. The ability to capture registration lists via LibCal permitted sending the feedback form to attendees after the event and forwarding the links to the recordings when they were ready. Sharing the registration lists with liaison librarians so they were able to see who from their departments attended offered additional potential follow-up opportunities.

Direct email marketing with embedded links is the most effective way to reach individuals where they are, allowing them to register on the spot without having to navigate to another site or perhaps forgetting to do so.

Post-event assessment can be outreach. Beyond gathering feedback from participants to improve future programming, a post-event survey can be a helpful marketing tool, as Marshall & Reid (2008) suggest. Sending a survey to all registrants can demonstrate a willingness to provide specific services desired by library users and “promote the Team’s key resources and services [and raise] the profile of Team members” (pp. 47–48).

Conclusion

As outreach to the campus community and as practice with new technologies and formats, the librarians found the Summer of Citations webinar series to be a success. Feedback suggested that in-person programming would be preferred by some attendees and that most participants learned something new about citation management software. With attendees from different units of the University in numbers that exceeded the typical attendance of previous in-person programs, the webinars reminded campus community members that the libraries provide important information and tools that are relevant in a remote learning and research environment. The librarians built upon their experience with presenting and teaching in an online environment by using Zoom and Springshare modules in new ways. Colleagues used the lessons learned and shared by the librarians to create similar online programming. As with many aspects of life during the COVID-19 pandemic, being flexible and reusing existing content in new ways allowed the librarians to react quickly and rethink how to reach members of their campus community in a new environment.

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